# Scheme web & data admin user guide

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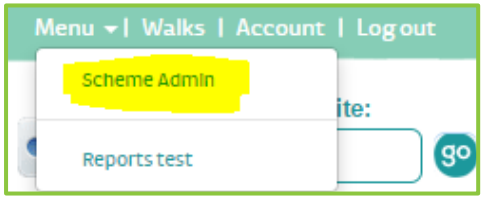
## What is the web & data admin role?

This role is suitable for anyone who oversees the internal data admin for their scheme, but isn't the main coordinator of that scheme. It allows them to carry out most functions that a coordinator can, apart from tasks such as ordering materials, controlling admin access for the scheme's users, and logging volunteer activity or notes on the CRM function. This role allows users to -

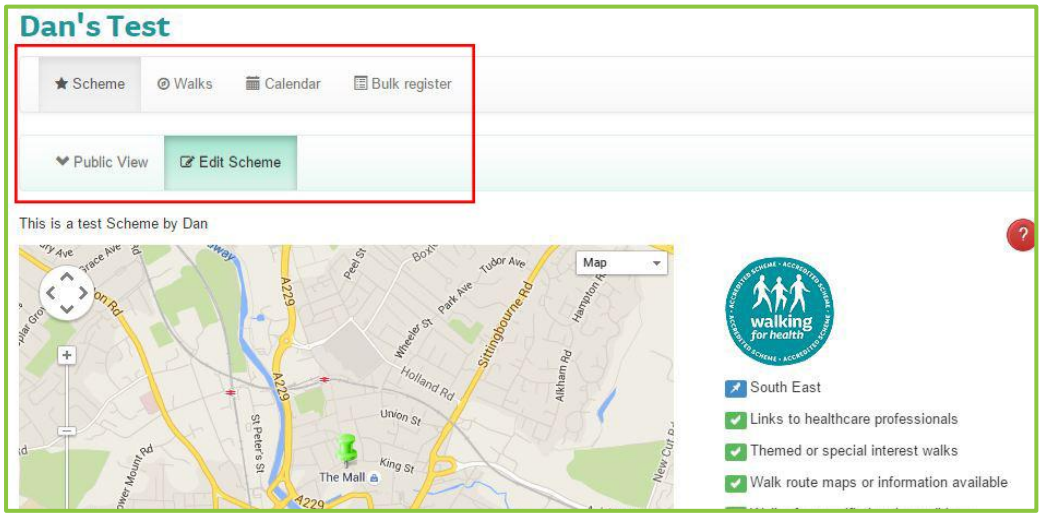
- Create walks
- Edit scheme details, including walks, options and dates
- Add one off walk events into 'walks or scheme' calendar, or ongoing regular walks into the 'walks calendar' in bulk
- Bulk remove scheduled walk events
- View and enter data (walkers/registers)
- Add risk assessments
- Add accident reports
- Run reports
- Assign or remove the role of volunteer and/or leader to walkers

# Accessing your scheme admin area

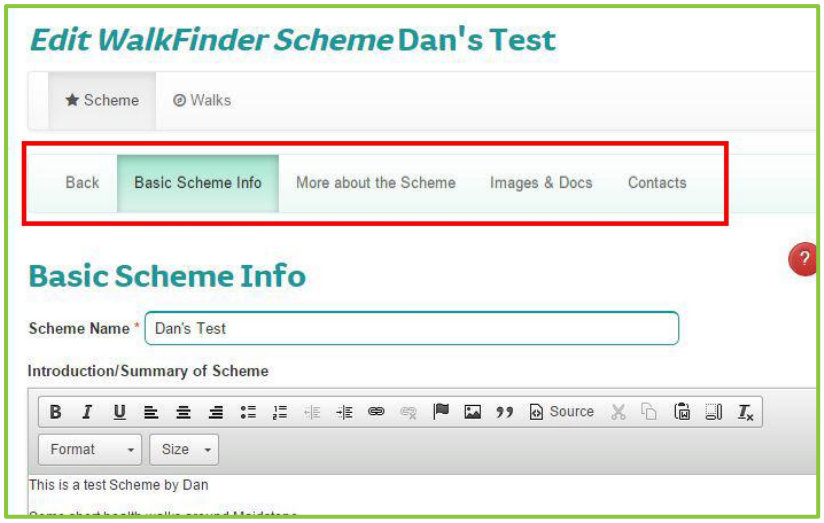
After logging in you should see a [Menu] button in the top-right area of your screen, clicking this will bring up an option for [Scheme admin] -




This will take you to the admin page for your scheme (or if you are involved in multiple schemes, you will first be presented with a list of those to choose from) with the new scheme admin menu bar -




Use the buttons at the top to navigate between different areas. Clicking on [Public View] will allow you to see your scheme's WalkFinder page as a general user would. Clicking [Edit Scheme] will allow you to update your scheme's information -



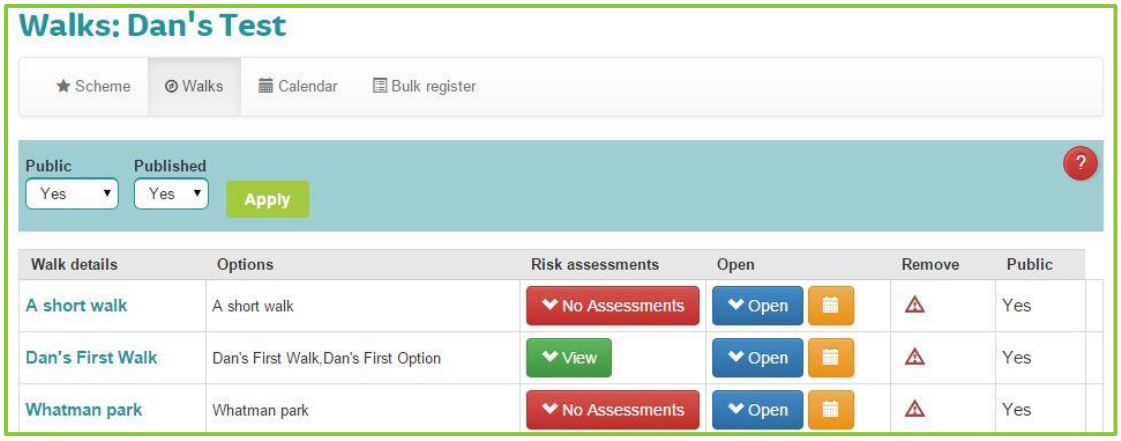
There is lots of useful information on updating your scheme page in the scheme page guidance document.

# Advertising your walks

## Viewing your list of walks

Your list of walks can be found here on your scheme admin bar -

It is important to ensure that your walk details here are as informative and up to date as possible as these are the first details that walkers are likely to see when they search for walks in your area via the Walk Finder. Clicking on the [Walks] tab will show your scheme's walks listed in alphabetical order -




By default the list will show public, published walks. This should include all walks that are open to everyone, as long as they are within the Walking for Health limit of 90 minutes.

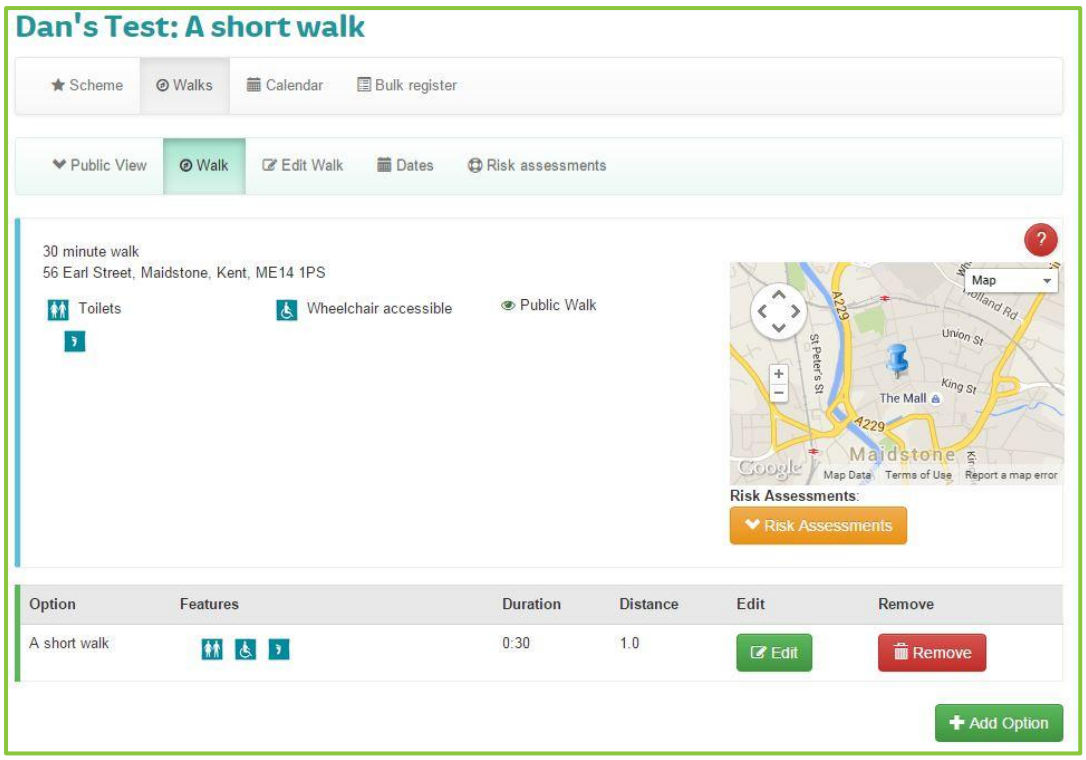
Private walks can be viewed using the dropdown menu under 'Public', and then by clicking [Apply].

Unpublished walks (i.e. ones that stopped running for a time) can be viewed using the drop down menu under 'Published', and then by clicking [Apply].

## Adding and editing walks

You can add a new walk to you scheme via the [Add Walk] button -

Or clicking 'Open' on one of your existing walks will allow you to view and edit details of that walk -




For more guidance on what to include when you add or edit your walks please see the scheme page guidance document.

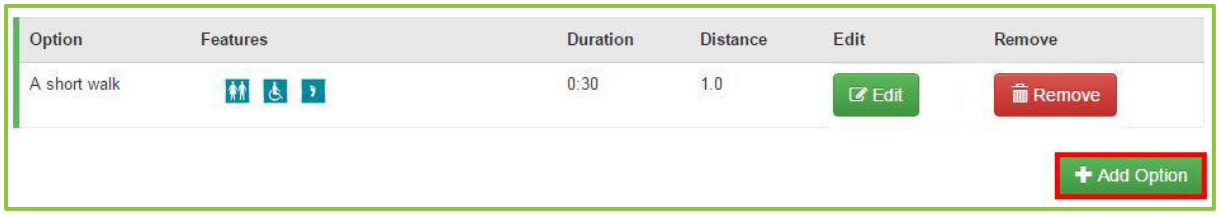
You can view or add risk assessments using the orange box.

## Adding or editing Walk Options

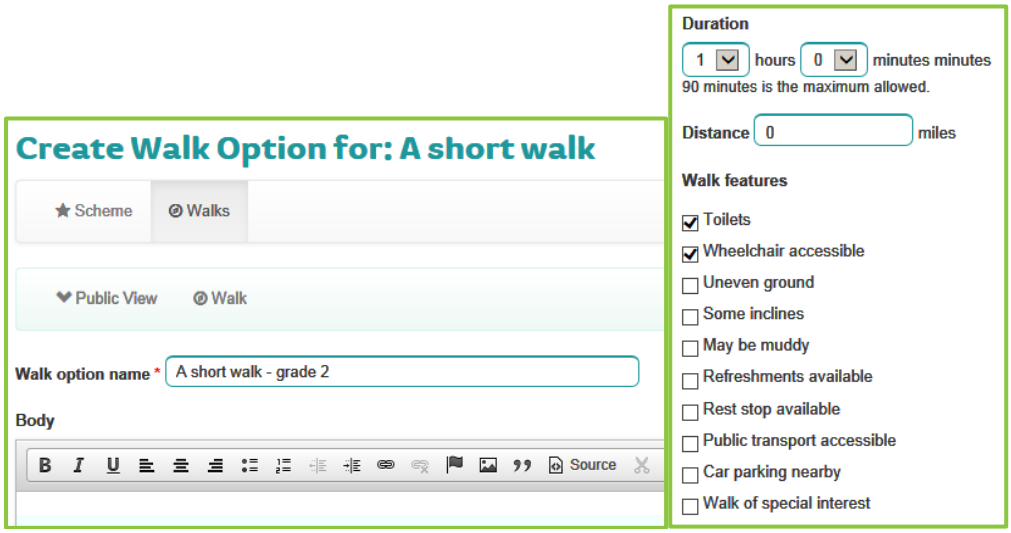
A walk option is a variation on a walk that shares the same starting point and time but has a different duration – for instance a short, half-hour option offered once a month on a weekly hour-long walk. This could also be used if your walk has the same start point each time, but you vary the route taken on different weeks.

At the bottom of the screen, you will see the details of the default walk option that was created when you set up this walk (or from the durations on the previous registers for this walk if this walk was brought over from the old database). There are two buttons next to the option -

- The green [Edit] button will allow you to make changes to this option (e.g. duration / features)
- The red [Remove] button will remove this option from the walk, and from any future calendar dates / un-submitted walk registers. If you remove the only option associated with a walk, the walk will default to a private walk.

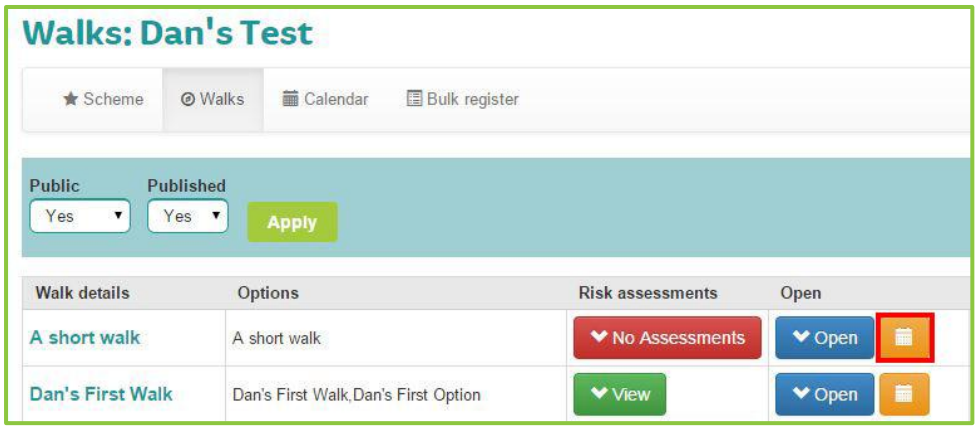



Simply add the walk option name, duration and walk features -

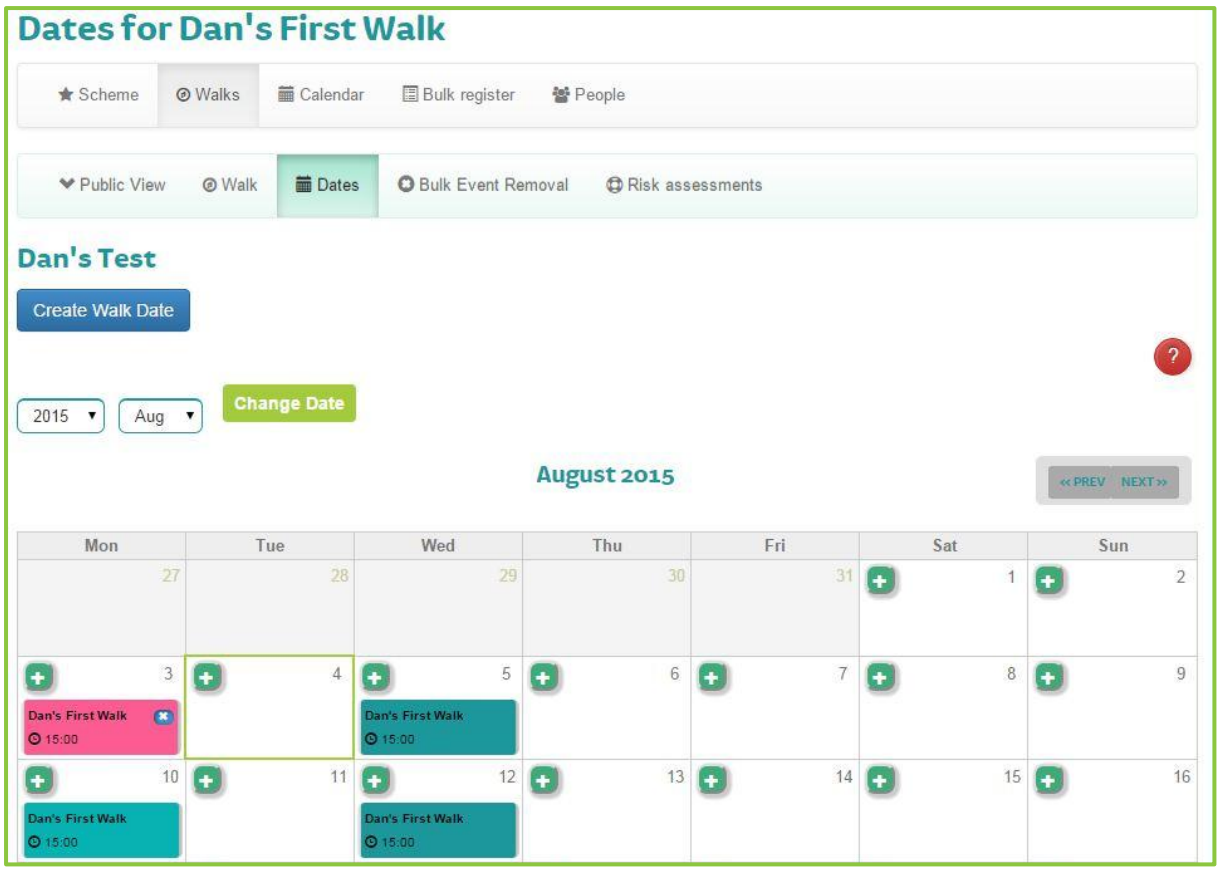



## Adding walk events to your calendar

You can schedule your walk events to appear on specific dates in your calendar. This enables the public to see when they will take place and also allows anyone with data admin access to easily enter walk registers for each event. To do this click on the orange 'Walk dates' button next to the walk that you wish to schedule -

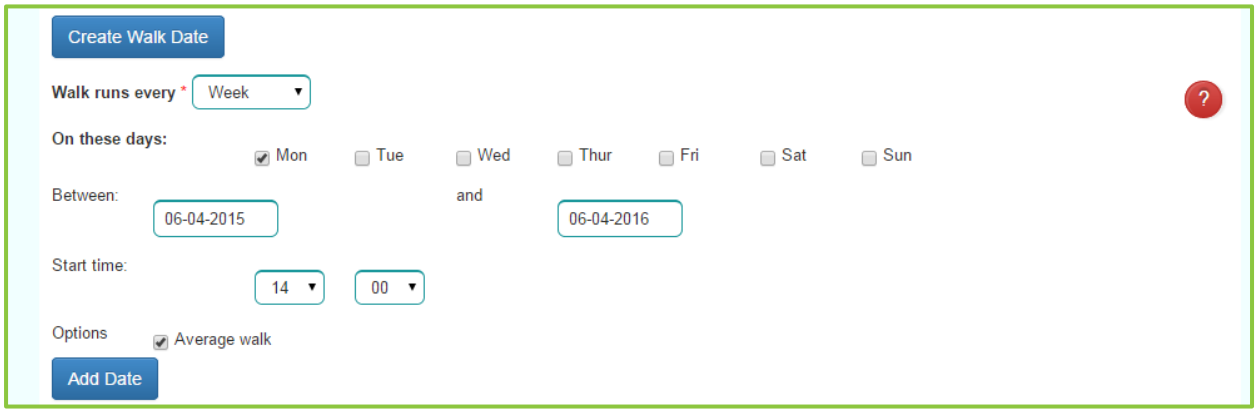



In the calendar that appears, you can then either click on the symbol to schedule a single walk event in for a particular date, or click on [Create Walk Date] to schedule a recurring series of walk events -

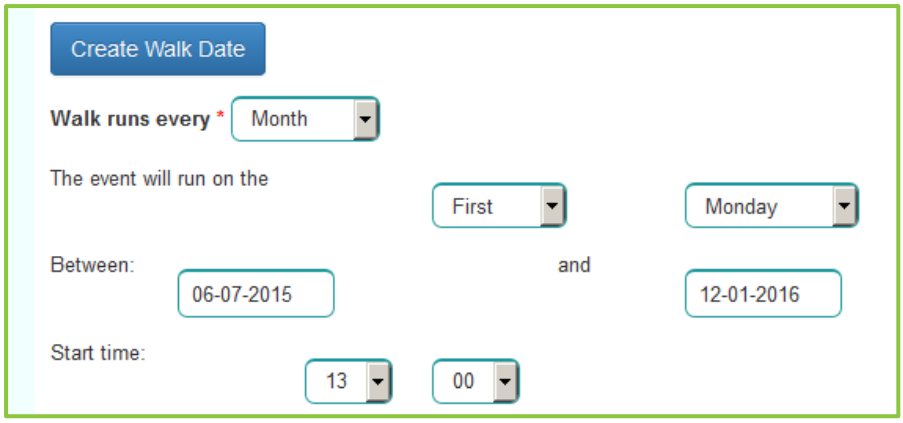



Start by amending the 'Walk runs every' filter to either 'week', 'fortnight' or 'month' depending on the schedule for the walk.

In the example below, the walk has been scheduled to take place every Monday for a year and has been backdated to the date of the oldest register in their backlog to be entered -



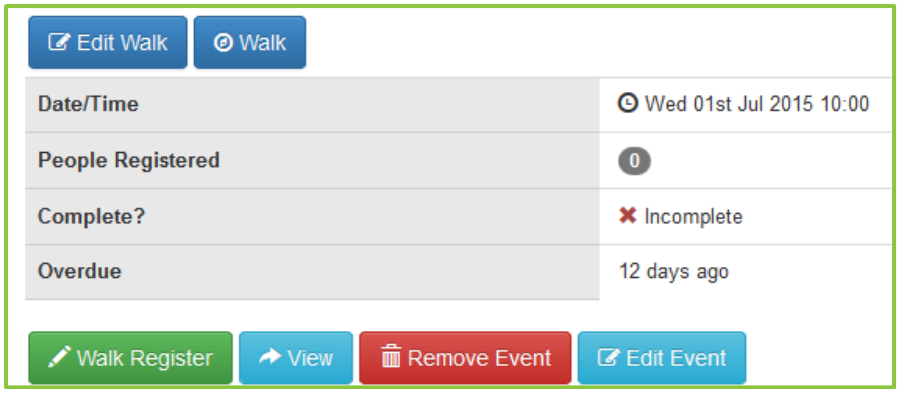

If the walk takes place on a monthly basis, once 'Month' has been selected, two drop down lists will appear to select both the day of the week and where it falls in the month -



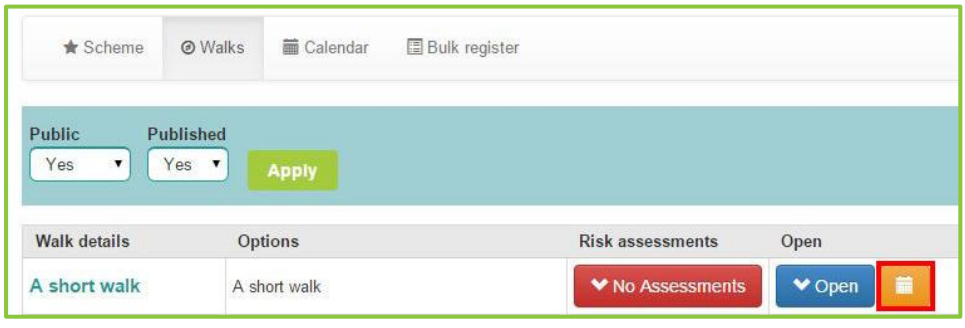

Once you click [Add date] you will be asked to confirm the dates and ensure there are no clashes (i.e. if the walk had already been scheduled in on that date) and then the walk dates will be added to your calendar.

## Removing walk events from calendar

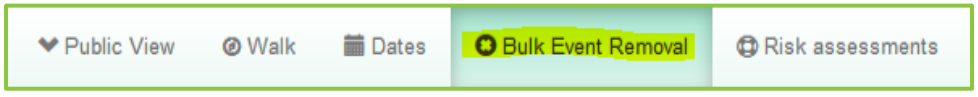
An individual walk date can be removed from the calendar, by clicking on it and then clicking [Remove Event] in the pop-up box (for instance if it has been cancelled due to bad weather) -



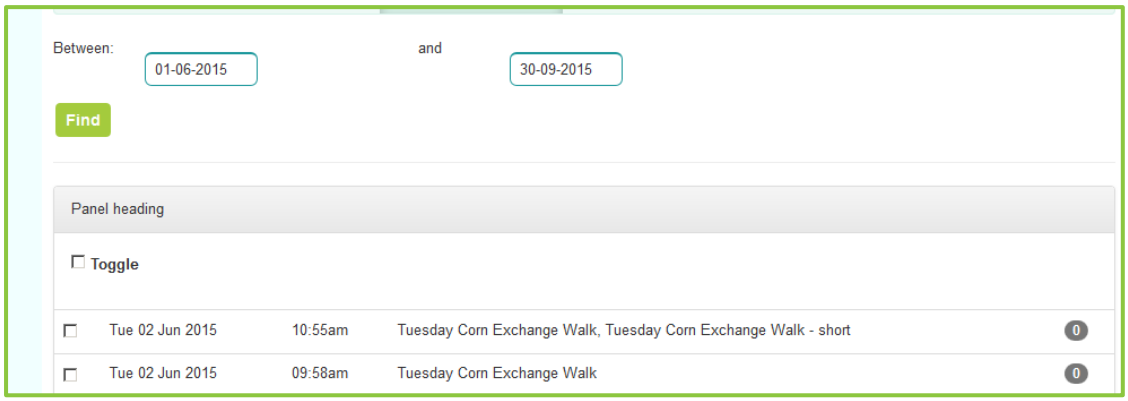

If you have scheduled a walk to take place regularly, but have made a mistake and wish to remove these dates in bulk, you can use the Bulk Event Removal tool. To do this, navigate to the [Dates] page for an individual walk -




You will see this in the menu -

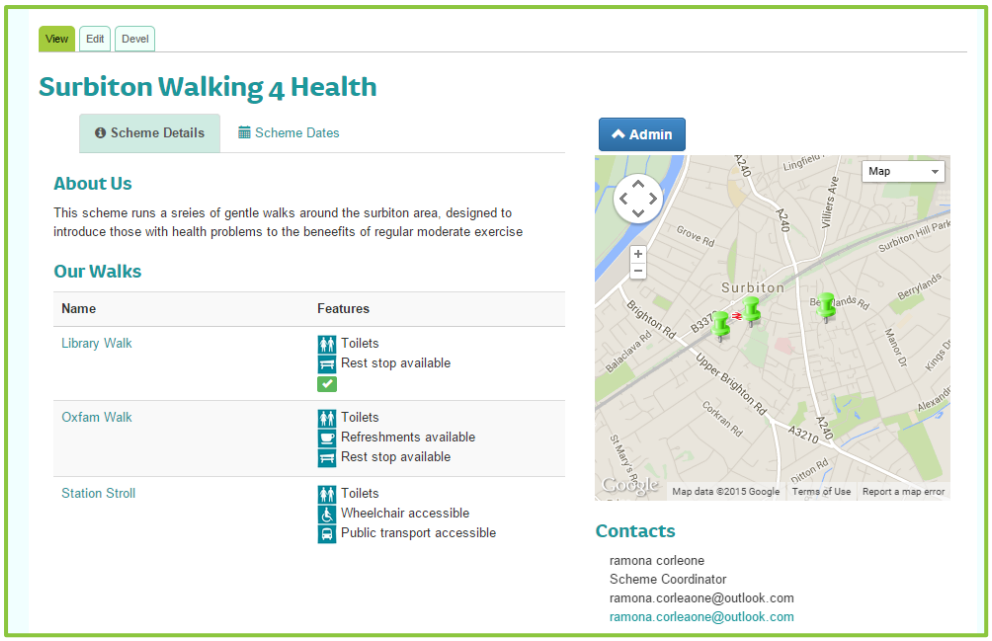


If you click on [Bulk Event Removal] you can select the date range the walks you wish to remove fall into, and then select the individual events you wish to remove -



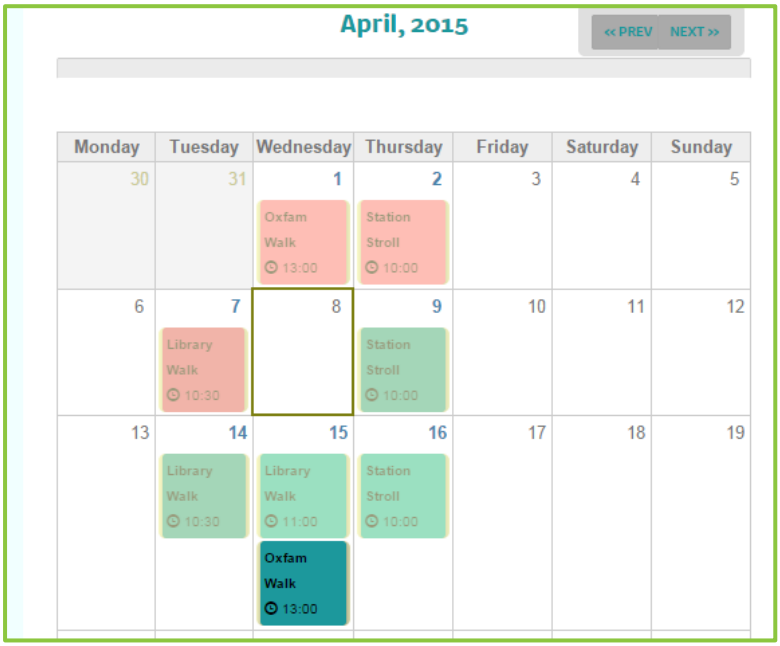

## Your scheme page

If you click on the [Public View] tab you will see your walks listed and shown on the map as they will be displayed to the public -

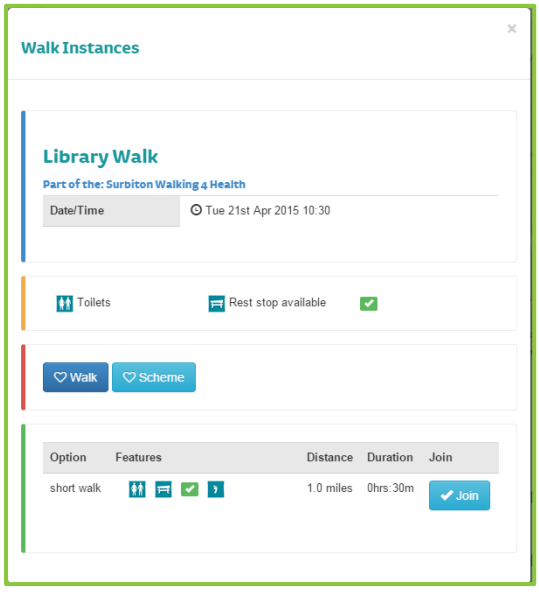



It is important to ensure this information is as informative and up to date as possible, to help walkers find out everything they need to know. For more guidance on this, please see the scheme page guidance document.

The [Scheme Dates] tab in this view shows the calendar where they can select a date/walk –




Once selected, a pop-up will display the details for this walk and, if it is in the future, includes a 'Join' button whereby they can add themselves to the register -



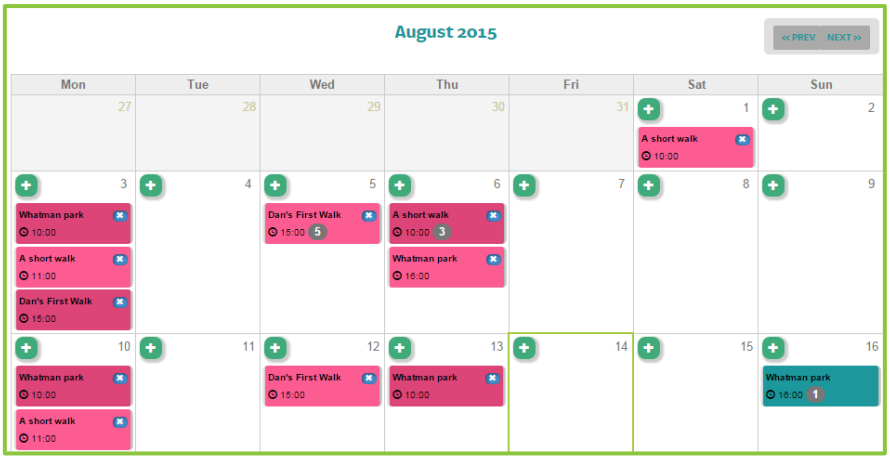

Once they click on [Join], they will be prompted to login or register for the site after which they will then be added to the provisional walk register. They will also be given the option to fill out a Walker Registration Form (WRF) online in advance of the walk if they are not already on the system.

# Walk Registers

## Locating your walk registers

Once a walk event is in your calendar, you can add a walk register to it. Click on the [Calendar] button in your scheme admin bar, or the dates button within a specific walk.

You will see all the scheduled walk events for the selected month -



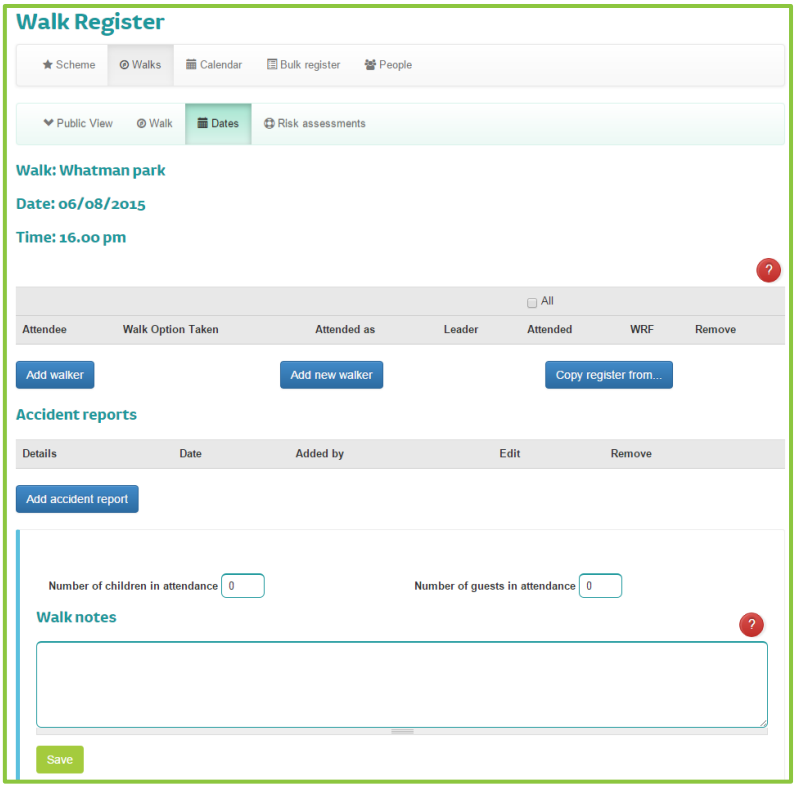

The key below the calendar tells you what the different colour walks mean -

Past Event: Incomplete  Past Event: Completed  Event today  Future Event

A grey circle within the box for a scheduled walk indicates the numbe rof registered walkers who have been added to that walk. If the walk event hasn't taken place yet, but has a grey circle in it, this suggests that walker(s) have registered themselvs onto the walk online, or that a printable register for the walk has been generated by another admin member of your scheme.

Clicking on a walk will trigger a pop-up box with the walk details; you can click

to view/edit the register -

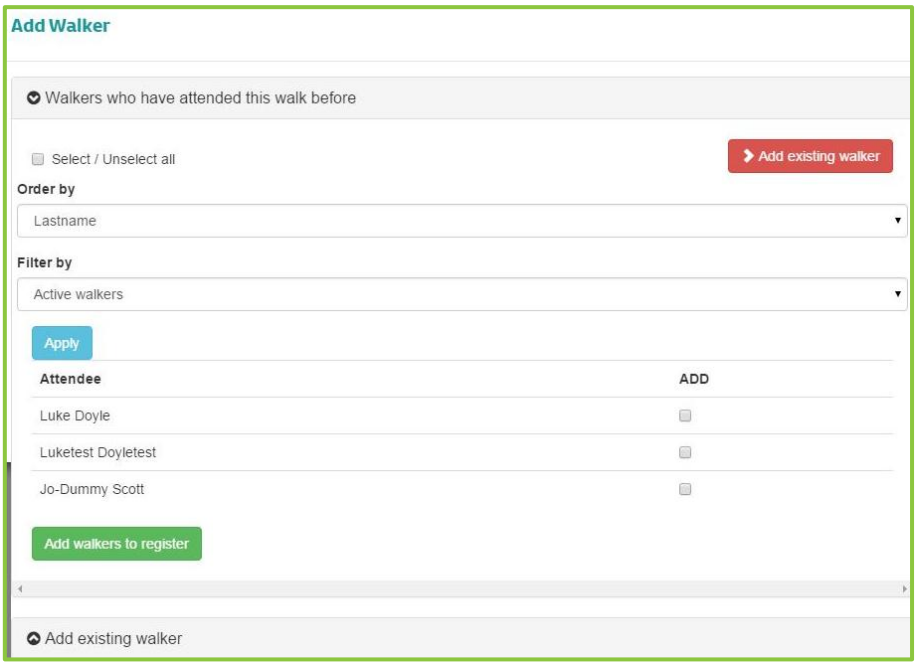



You can also click on [Add accident report**]** to add an accident report to this walk.

## Adding walkers to a register

There are three buttons, left to right, to add walkers to your register:

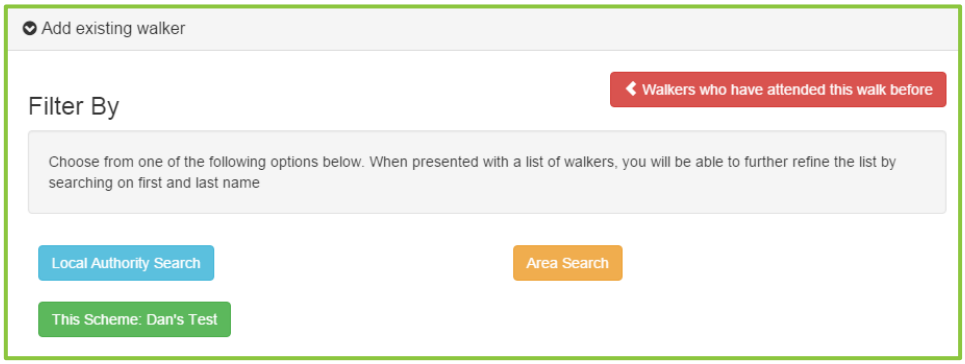
1) Add walker – This allows you to add existing walkers in the system to your walk register. If you've added a register for this walk before you'll see a list of 'walkers who have attended this walk before' -




Tick the box next to each walker that you wish to add to the register, and then click on [Add walkers to register] at the bottom of the list of names. If you want to add the majority of walkers in the list, the list, you can tick the box next to 'select / unselect all'.

Walkers can also be ordered by first or last name or filtered by active and inactive walkers using the drop down options above the list of walkers.

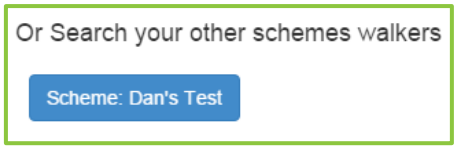
To add walkers who haven't attended the walk before click 'Add existing walker' which will bring up some search options -


Add existing walker
Walkers who have attended this walk before
Filter By
Choose from one of the following options below. When presented with a list of walkers, you will be able to further refine the list by searching on first and last name
Local Authority Search
Area Search
This Scheme: Dan's Test

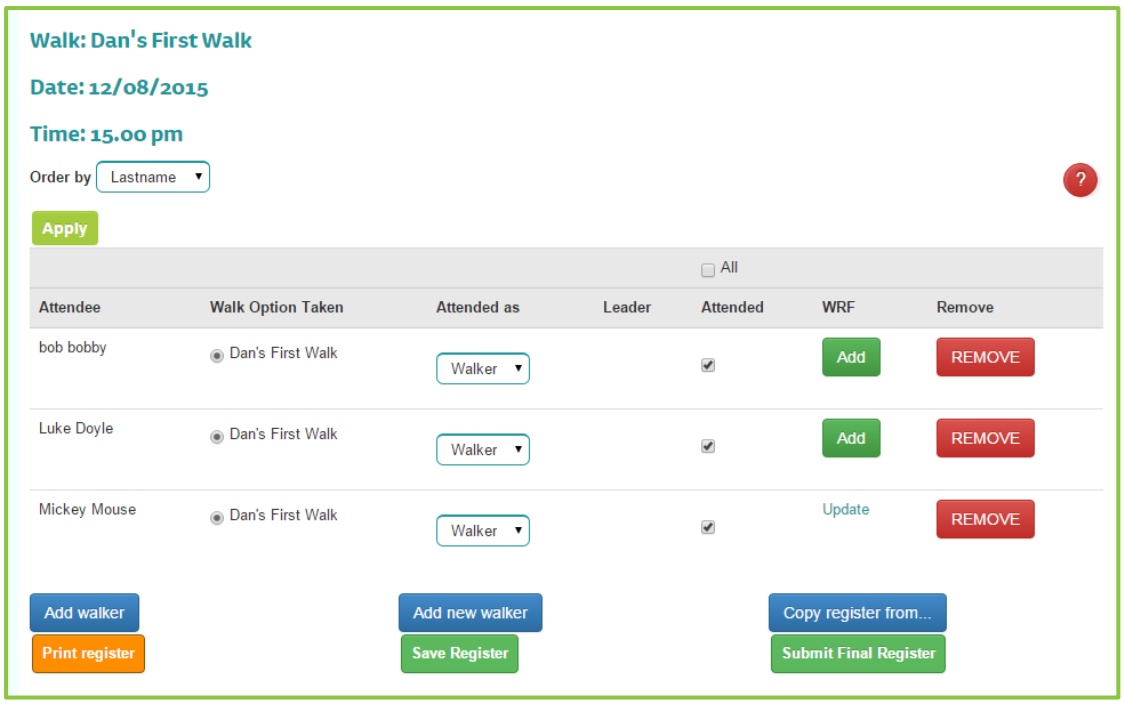
- **Local Authority Search** allows you to search within different local authorities (the local authority the walker lives in)
- **Area Search** allows you to search in different geographical locations

- **This Scheme** allows you to search walkers within your own scheme

If you are linked with more than one scheme you will have the option to search in your other schemes -



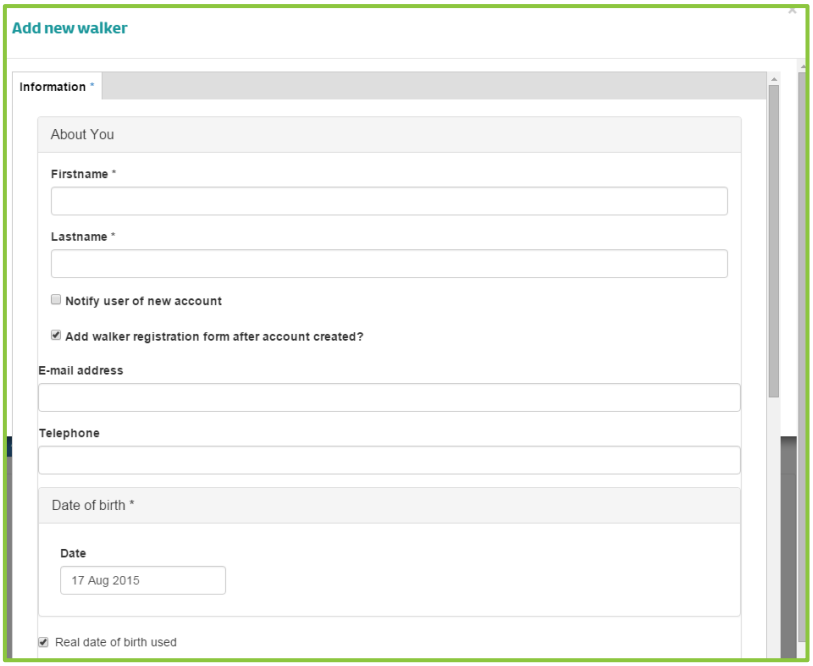

Select the walkers that you want to add and click [Add Walkers] to add them to your register -




**Note: A walker from outside your scheme will be marked as 'approval pending', and you will not be able to access their details until a member of staff has marked them 'approved' centrally, at which point they will be linked to your scheme.**

**Once a walker has been added to a walk they will appear on future registers for that walk.**

2) Add new walker – This enables you to add a new walker to the system. You will first be prompted to add some basic details to register them in the database (this is the same form that people using the website can use to register, hence the 'about you' terminology) -




**Note: Date of birth and postcode are now mandatory fields. This will help to avoid duplicate entries and to facilitate robust and accurate reporting. If a walker refuses to give a date of birth, try and get an approximate age i.e. year of birth and enter an estimated DOB. If you have estimated a DOB please un-tick the 'Real Date of birth' box underneath the date of birth.**

When adding a new walker this box will be automatically ticked. When you finish adding a walk you will be prompted to complete a Walker Registration Form.

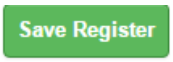
If you'd rather add WRFs at another time you can un-tick the box, and add these later on in the 'People' tab -

3)

– This button allows you to copy a list from a previous register where the attendance was similar, removing the need to do this register from scratch. Selecting this option will give you the option to select a date, and choose whether to list all those who were added to the original register, or just those whose attendance was confirmed.

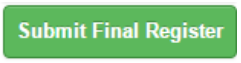
To keep a record of who led the walk, tick the box in the 'leader' column next to the names of the walk leaders (this box will only be there if the walker has been set as a walk leader on their record, please speak to your coordinator if this hasn't happened). If the leader was a volunteer, make sure you change the drop down box next to their name from 'Walker' to Volunteer' to ensure the walk is

added to the volunteer logs (again only possible if they have been marked as a volunteer on their record).

**Note:** If you click 

, then your changes will be saved, but not committed to the reporting database. You will then be able to return to the register and make further changes if necessary.

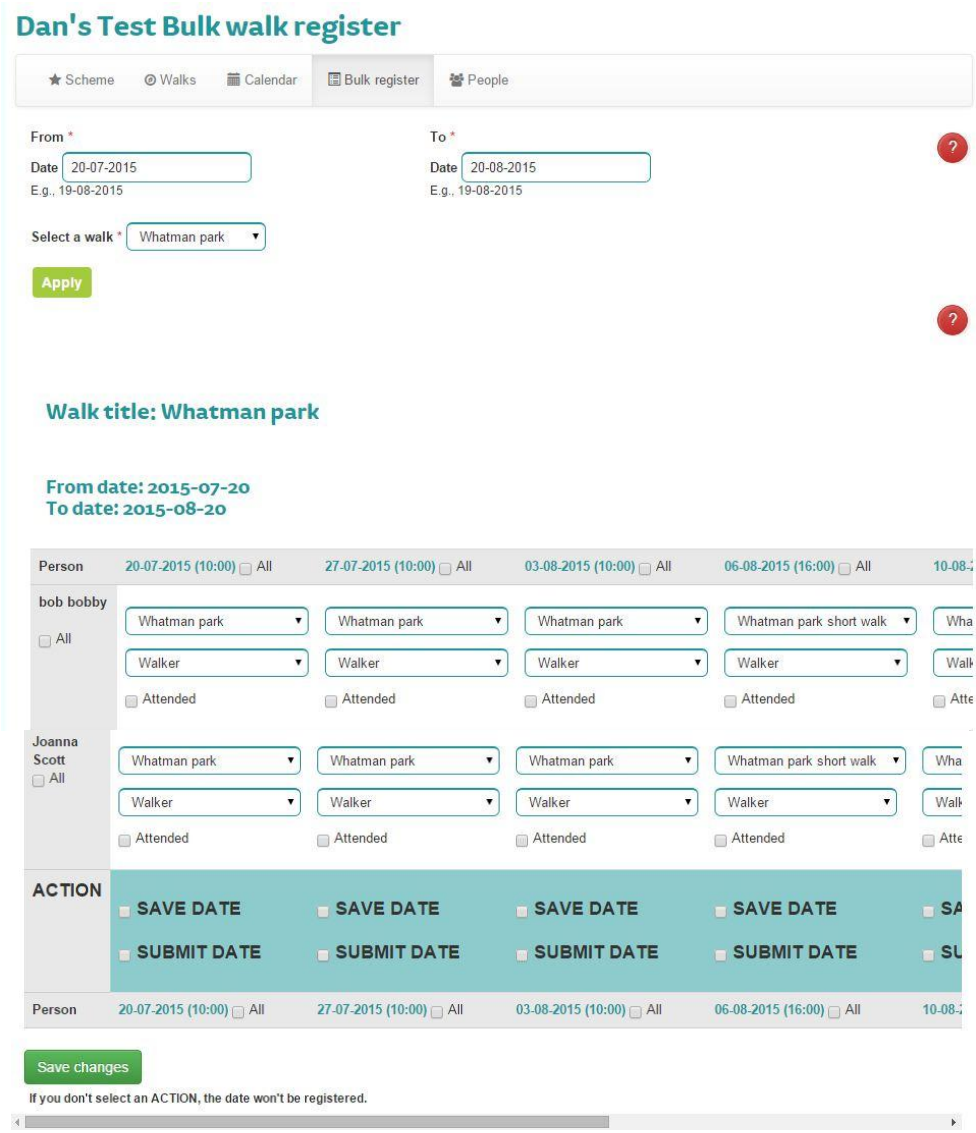
There is also a save button at the bottom of the register pop up that will save all details added.

Once you have clicked on 

, the data will be included in reporting data and added onto walker's logs, and the register will no longer be editable.

## Adding registers in bulk

By clicking on the [Bulk register] button in your scheme admin bar, you can easily enter a number of registers for multiple past events of a regular walk where most of the attendance details are the same. You can select the walk and date ranges required, and then fill in the grid with the attendances -




You can use the 'All' tick boxes to quickly select all walkers in a row or column.

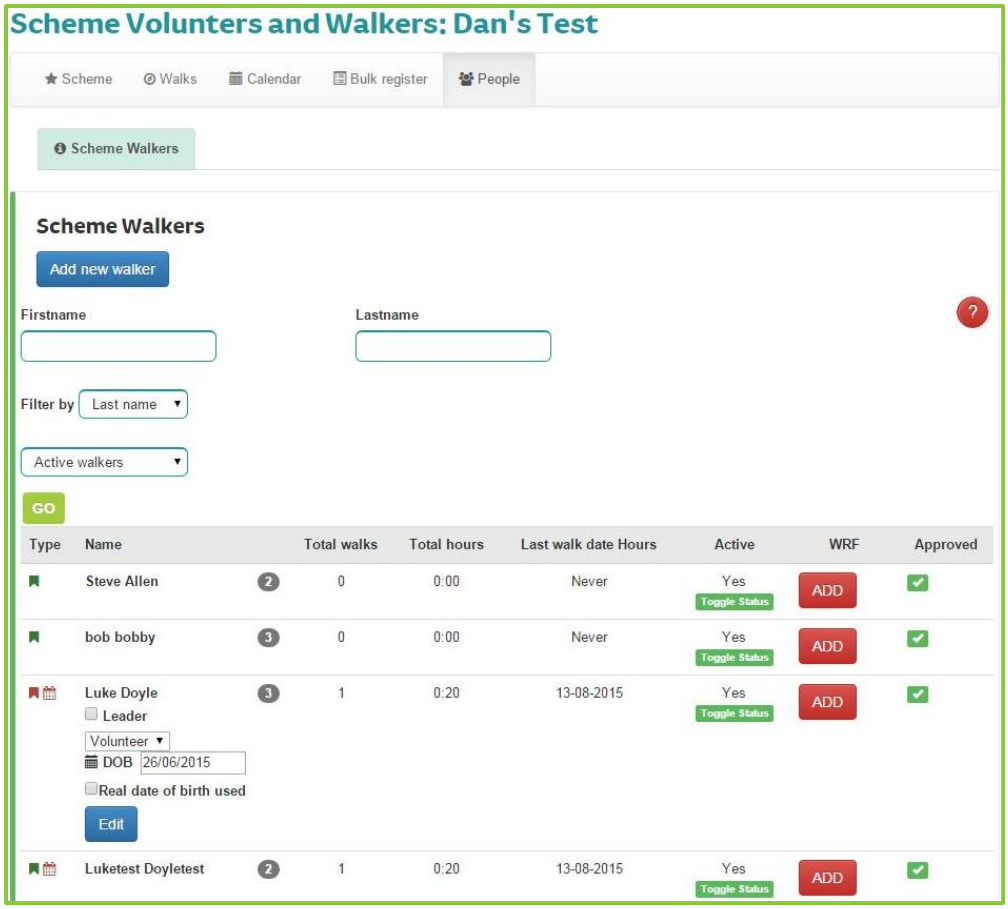
At the bottom of each column, you will need to either tick **SAVE DATE** if you want to come back to the register later, or tick **SUBMIT DATE** if the register is complete (if you don't tick either, your selections won't be saved.

Once you have selected one of the tick boxes, you will need to click [Save changes].

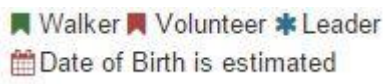
Once you have saved any changes you can navigate into an individual register to make any additions required there (add anyone who hasn't been on that walk before) by clicking on the date in blue at the top or bottom of the column.

## Managing your walkers and volunteers

By clicking on the [People] button in your scheme admin bar, you can view all your scheme walkers, along with some key information. You can search for specific walkers or filter by first or last name, or status -




The **Type** column uses icons to indicate useful information about the individual -




- The green flag indicates normal walker status – the majority of your walkers will be in this category.
- The red flag indicates a volunteer other than walk leader – such as admin, promotion, and any other volunteer categories
- The blue star indicates walk leader – those volunteers who have been trained as walk leaders
- The red calendar means that the date of birth (DOB) for the walker in the system was an estimate based on their age bracket when importing from the old database system. It will improve the accuracy of your reports if you can get this updated with a genuine DOB.

If you click on a walker name, you can view/edit their DOB. If you edit a walker's DOB and the database previously had an estimated DOB, it will assume that the new one is correct. The calendar icon will disappear from the 'Type' column' and a tick will appear next to 'Real date of birth used'.

You also have the ability to mark walkers as a walk leader (if they have been trained) and / or volunteer. The volunteer role is set by changing the drop down menu from walker to volunteer, and walk leader is set by ticking the box next to the word 'leader' These changes will take place automatically, but you may need to refresh your browser to see this.

The Active column indicates their status within your scheme, by toggling this to ‘No' you can filter them out of your active lists, here and on walk registers.

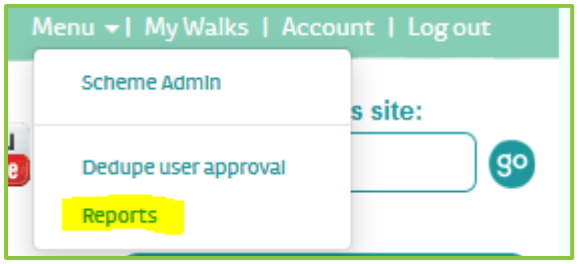
The WRF column allows you to add data from their Walker Registration Form if this hasn’t been added to the system yet, or to update data on their health or contact preferences if they have filled out an update form due to a change in circumstances.

By clicking on the edit button underneath the walker’s name, you can update their contact details or name.

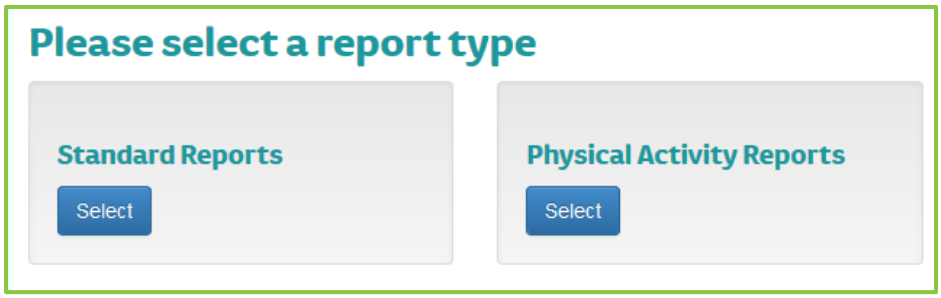
At the top of the page there is an [Add new walker] button which allows you to add new walkers to your scheme -

## Reporting

Once again, the reporting functions are accessed via your menu -

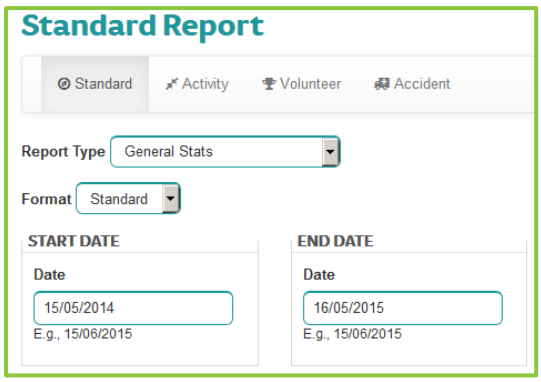


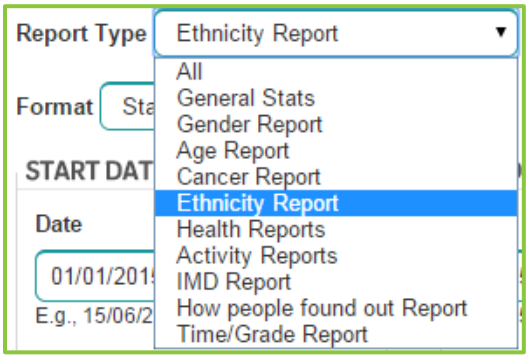

There are two types of reports currently available -

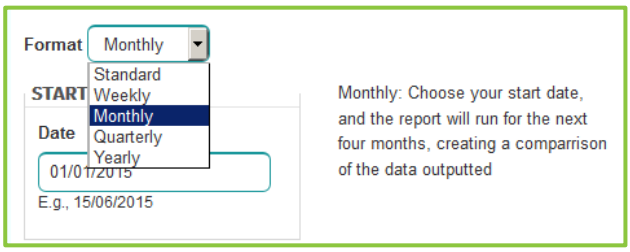



### Standard Reports

You can select a date range, a report type and format – and, if you require, a sub-set of your walks.




You can also filter on any aspect of the Walker Registration Form (WRF)

## Physical Activity reports

These allow you to produce cross-tabulated reports on any two factors from your walkers' health and demographic profiles to see activity levels of the individuals within those criteria on health walks

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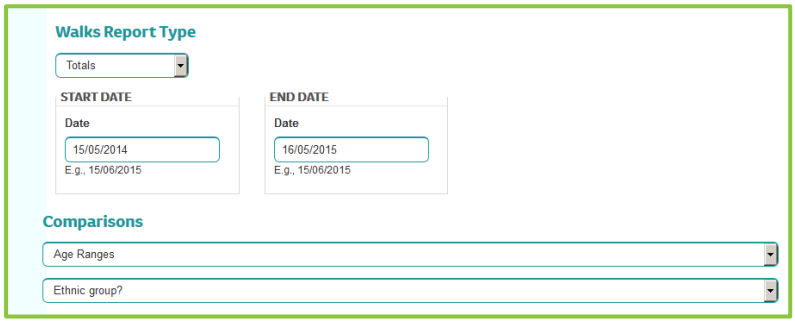

It has been designed largely to allow you to correlate responses given to the physical activity questions by walkers at the point of joining with other criteria. For example you might want to see the activity levels of individuals with a long-term health condition who did no activity prior to joining Walking for Health.

For more detail on running reports please see the in depth reporting guidance.

As we are still refining the functionality of these reports, we would be interested to know how you intend to use this so we can ensure that they meet your needs. Please contact Liz, our intelligence and research support officer, who can help guide you further through the various reporting options and output formats available - liz.cronin@ramblers.org.uk